



# **Homeownership Capacity Data Collection System (DCS) User Guide**

*October 2021*



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## Introduction

The Homeownership Capacity Data Collection System (the “DCS”) is a web-based data collection system designed specifically for the Homeownership Capacity Program (the “Program”). Homeownership Capacity Grantees (the “Grantees”) are required to use the DCS to report on all households that enter the Program.

This Homeownership Capacity DCS User Guide outlines all the information Grantees will need to gain access, enter data, navigating the DCS for other tasks such as printing a summary of the Client data and sorting data to determine the date for subsequent Client follow ups, and how to report issues in the DCS.

All Program information on data collection, reporting, and documentation requirements related to the DCS can be found in the [Homeownership Capacity Manual](#) (the “Manual”) which is located on the [Minnesota Housing](#) website.

## Chapter 1 – The Homeownership Capacity DCS

### 1.01 Gaining System Access and User Privileges

Grantees must contact [Minnesota Housing](#) in the following situations:

- A staff person (existing or new) needs access to the DCS;
- A staff person who has access no longer needs access.

The Grantee's Program Manager must contact [Minnesota Housing](#) with the following DCS User information:

- Staff person's full name;
- Staff person's email address;
- Date to activate or deactivate access.

Once the staff person (the "User") has access, they will receive an email with log in instructions. All Users have the same access privileges. This means that all Users within the Grantee's organization will be able to access and can update data on any existing Client in the DCS.

### 1.02 Accessing the DCS

Once the User obtained access to the DCS, follow the screenshots below on how to log in to the DCS.



## Secure Login – Single Family Applications



**Single Family Applications**

[Click here to access the Loan Commitment System.](#) It is **only** compatible with Microsoft Edge, Chrome and Firefox. Explorer

[Single Family Secure File Exchange](#)

This tool allows organizations to securely upload and download documentation for the following programs:

- Community Homeownership Impact Fund (Impact Fund)
- Emergency and Accessibility Loan Program
- Enhanced Financial Capacity Homeownership Initiative (Homeownership Capacity)
- Homeownership Education, Counseling and Training Fund (HECAT)
- Rehabilitation Loan Program
- Start Up and Step Up documents

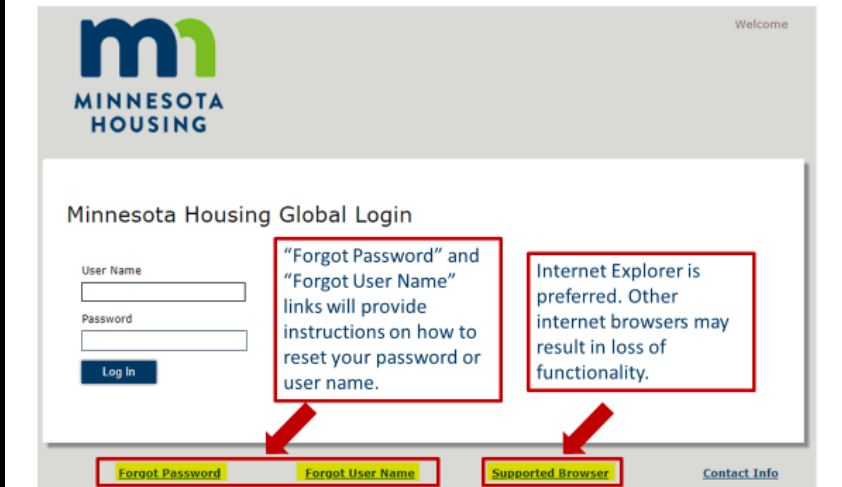
Please review the [instructions](#) on how to use the Single Family Secure File Exchange.

**Homeownership Capacity Data Collection system**

This tool allows organizations to securely report client level data for the Homeownership Capacity program. Please review the instructions on how to use the Homeownership Capacity Data Collection System.

*Annotations: A red arrow points from the 'Quick Links' sidebar to the 'Homeownership Capacity Data Collection system' link. A red box highlights this link. Another red box highlights the 'Forgot Password' and 'Forgot User Name' links at the bottom of the page.*

## Login



MINNESOTA HOUSING

Welcome

### Minnesota Housing Global Login

User Name

Password

[Log In](#)

**“Forgot Password” and “Forgot User Name” links will provide instructions on how to reset your password or user name.**

**Internet Explorer is preferred. Other internet browsers may result in loss of functionality.**

**Forgot Password** **Forgot User Name** **Supported Browser** [Contact Info](#)

*Annotations: Red boxes highlight the 'Forgot Password' and 'Forgot User Name' links, the 'Supported Browser' link, and the text about Internet Explorer. Red arrows point from the text boxes to the links.*

Login

MINNESOTA HOUSING

Welcome

Minnesota Housing Global Login

User Name  
Password  
Log In

Enter your "User Name" and "Password" and the click on "Log In."

Note for first-time user: Your temporary password was emailed to you.

[Forgot Password](#) [Forgot User Name](#) [Supported Browser](#) [Contact Info](#)

Change Password'."/>

Homeownership Capacity Data Collection System

MINNESOTA HOUSING

Authorized Applications

Homeownership Capacity Data Collection System

You have 90 days left before your password expires. [Change Password](#)

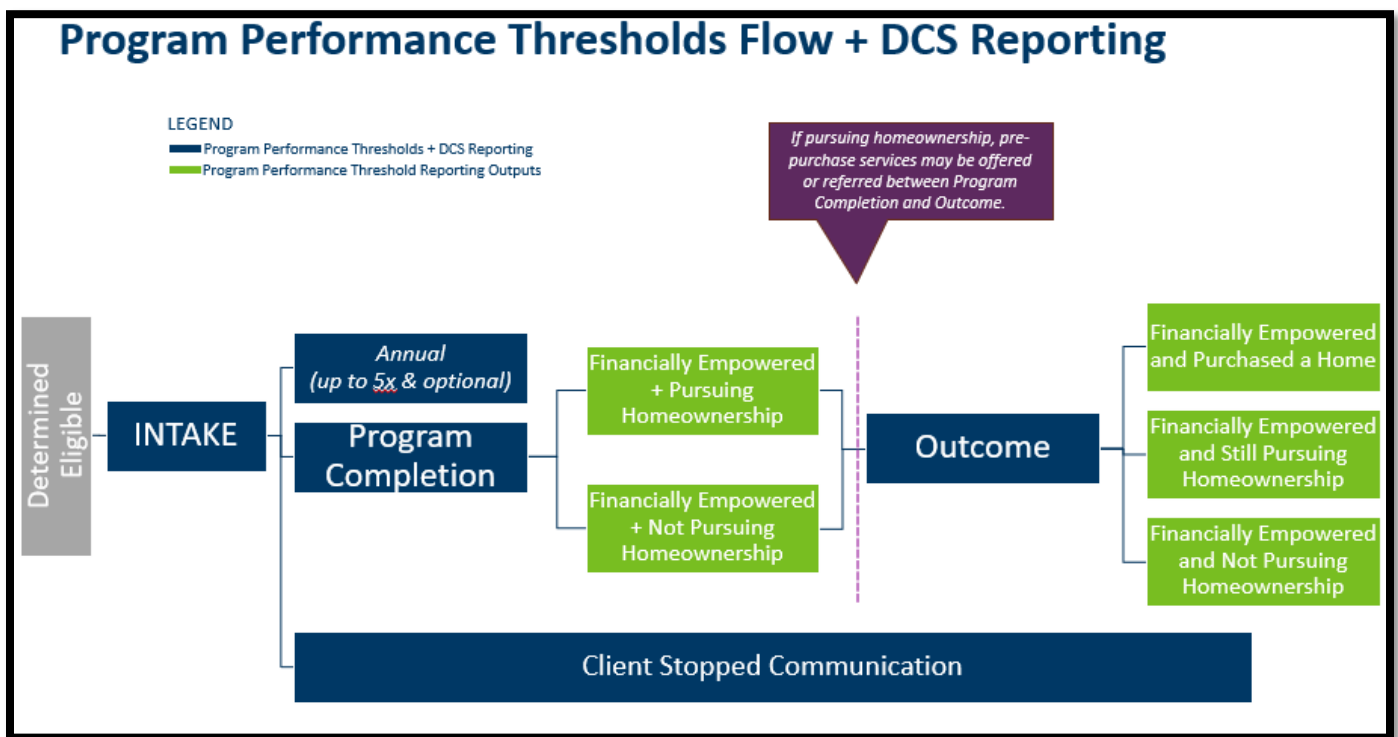
Once the User has logged in to the DCS, they may now complete any of the following:

- [Add new Client and enter Intake data](#)
- [Enter data for any subsequent stage](#): Annual, Program Completion, Outcome, Client Stopped Communication
- [Other DCS navigation](#)

### 1.03 Program Performance Threshold Flow

There are multiple Program Performance Thresholds<sup>1</sup> where data may be collected. Each stage of the Client’s progress through the Program is called a Program Performance Threshold or a Survey<sup>2</sup> in the DCS. The DCS is designed to release subsequent Program Performance Threshold only once the necessary information from the previous Program Performance Threshold has been submitted. For example, a User will only be able to access the Annual, Program Completion Data, Program Completion Client Survey or Client Stopped Communication Survey(s) once they have submitted all Intake data for that Client. All required fields must be completed before the User can successfully submit that Program Performance Threshold data.

See the [Homeownership Capacity Program Manual](#) (“the Manual”) for reporting requirements. See below for the Program Performance Threshold flow established in the DCS.



### 1.04 Add New Client and Enter Intake Data

Once the User has determined the Client met eligibility requirements, the User may add a new Client and the Intake data. Follow the screenshots below.


<sup>1</sup> Refer to the Homeownership Capacity Program Manual, located on the Minnesota Housing website.

<sup>2</sup> Program Performance Thresholds is the term used for the Homeownership Capacity Program. Refer to the Homeownership Capacity Program Manual for more information. Survey is the term used for the DCS. They may be used interchangeably in this document.



# MINNESOTA HOUSING – HOMEOWNERSHIP CAPACITY DATA COLLECTION SYSTEM USER GUIDE

## Welcome Screen


Homeownership Capacity Data Collection System
Log off

[Home »](#)

**Test Organization**

[Add new Client](#)


Click "Add new Client" to input the **Intake** data. Once the Intake data has been created, the Client information will appear in the table below.

This table below is a list of Clients who's already been entered into the DCS. Each column may be sorted.

Client	Intake Data	Annual Data	Annual Data	Annual Data	Annual Data	Annual Data	Completion Data	Purchased Data	Not Purchased Data	Continuing Data	Client stopped Communication

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## Add New Client


Homeownership Capacity Data Collection System

[Home »](#)

**Primary Client Last Name**

**Primary Client First Name**

[Add Client](#)
[Cancel](#)

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The screenshot shows the 'Enter Client Intake Data' page. At the top is a dark blue header with the text 'Enter Client Intake Data'. Below this is a light gray banner with the Minnesota Housing logo on the left and the text 'Homeownership Capacity Data Collection System' on the right. Under the banner is a navigation bar with a 'Home' link. The main content area is titled 'Test Client'. Below this title, the 'Update Client' button is highlighted with a red rectangular box, and a red arrow points to it from the right. Below the 'Update Client' button is a 'Print Client Summary' button. At the bottom of the page, there is a footer with the text '© 2021 - Minnesota Housing Finance Agency', the date '10/21/2021', the text 'Minnesota Housing | mnhousing.gov', and the page number '8'.

The screenshot shows the 'Enter Client Intake Data' page. At the top is a dark blue header with the text 'Enter Client Intake Data'. Below this is a light gray banner with the Minnesota Housing logo on the left and the text 'Homeownership Capacity Data Collection System' on the right. Under the banner is a navigation bar with a 'Home' link. The main content area is titled 'Test Client'. Below this title, the text 'You can do one of the following:' is displayed. Below this text, the 'Intake Data' button is highlighted with a red rectangular box, and a red arrow points to it from the right. Below the 'Intake Data' button is a 'Cancel' button. At the bottom of the page, there is a footer with the text '© 2021 - Minnesota Housing Finance Agency', the date '10/21/2021', the text 'Minnesota Housing | mnhousing.gov', and the page number '9'.

## 1.05 Entering Subsequent Data

Refer to the [Manual](#) to ensure data is entered into the correct Survey and for other Client file reporting or supporting documents. Once the User had added a new Client and Intake data, they may access any of the following Surveys:

- **Annual Data**
  - This Survey is optional.
  - This Survey may be completed at any time or annually up to five times.

- This Survey does not need to be completed to access the Program Completion Data survey.
- **Program Completion Data**
  - The Program Completion Program Performance Threshold will appear after the Intake Program Performance Threshold data has been entered and completed.
    - Users may submit this Program Performance Threshold one time.
    - Follow the [Manual](#) for additional guidance.
  - Users will not be able to go back and enter Annual Data
- **Outcome Data**
  - The Outcome Program Performance Threshold will appear after the Program Completion Program Performance Threshold data has been entered and completed.
    - Users may submit this survey one time.
    - Follow the [Manual](#) for additional guidance.
- **Client Stopped Communication**
  - Refer to the [Manual](#) for the circumstances under which a Client should be entered as Client Stopped Communication.
  - Once the Client is entered as Client Stopped Communication, the User will not be able to access any Program Performance Thresholds.

To access this list of Program Performance Thresholds, follow the screenshots below:

Enter Subsequent Data

Homeownership Capacity Data Collection System

Home > City of Mankato >

**Test Client**


[Update Client](#)

Survey History


Question	Intake Data 10/21/2021 <a href="#">edit</a>	Annual Data 10/21/2021 <a href="#">edit</a>
----------	---	---

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### Enter Subsequent Data

**Homeownership Capacity Data Collection System**


**Test Client**

Intake Data;  
Annual Data;

These are Program Performance Thresholds already completed.

You can do one of the following:

Annual data  
Program Completion Data  
Client Stopped Communication



These are Program Performance Thresholds available to be completed.

### Program Performance Threshold Program Completion

**Homeownership Capacity Data Collection System**

11. Client Pursuing Homeownership?  
☐ Yes ☒ No

12. If not, why?

13. Notes


In the Program Completion DCS entry, be sure to include notes from the Program Completion Form and identify if the client is financially empowered.

14. I certify I answered all of the above questions  
☐ Yes ☒ No

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Program Performance Threshold  
Outcome Data



Homeownership Capacity Data Collection System

Test Client



Intake Data;

Annual Data;

Program Completion Data;

These are Program Performance  
Thresholds already completed.

You can do one of the following:

These are the final  
Outcomes available. Select  
the appropriate Outcome.

Outcome Data - Client is Financially Empowered and Purchased a Home

Outcome Data - Client is Financially Empowered and Decided Not to Purchase

Outcome Data - Client is Financially Empowered and Continues to Pursue Homeownership

Client has Stopped Communication

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The User will know they have completed all the required data entry when there are no additional Program Performance Threshold options to select.

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## Chapter 2 – Other DCS Navigation

### 2.01 Returning to the Survey History Page

At any time, the User may click Cancel to return to the Survey History page for their Client.

No Additional Program Performance Thresholds

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**Test Client**

- Intake Data;
- Annual Data;
- Program Completion Data;
- Outcome Data - Client Continues to Pursue Homeownership;

You can do one of the following:

10/22/2021 Cancel 13

### 2.02 Printing the Client Summary

At any time after Intake data has been entered, the User can print a summary of the Client data that has been entered in the DCS. This can be a useful tool to share with the Client to demonstrate progress.

Print Client Survey

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20	Client Birth Year	1999			
21	Rent	\$1,000.00	\$1.00	\$1.00	
22	Savings	\$1.00	\$0.00	\$10,000.00	
23	Monthly Household Income	\$1,400.00	\$0.00	\$4,000.00	
24	While the income you provided is monthly, if the gross annual income is less than \$20,000, provide a brief explanation of how this Client may achieve homeownership.				
25	Credit Score	600		800	
26	Collections/Judgments	\$0.00	\$0.00	\$0.00	
27	Credit Card/Unsecured Balance	\$0.00	\$0.00	\$0.00	
28	Student Loan Balance	\$0.00	\$0.00	\$0.00	
29	Secured/Auto/etc.	\$0.00	\$0.00	\$0.00	
30	Notes				
31	I certify I answered all of the above questions				

Print Client Summary

For a printable version of the Client's history, go to the bottom of the Survey History and click.

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## Print Client Survey

Homeownership Capacity Data Collection System  
Client Summary Report

Report Date: Friday, October 22, 2021

**Primary Client:** Test Client  
**Year of Birth:** 1999  
**Client Address:** 1234 MAIN STREET  
**First gen Hb:** Yes  
**Race:** Asian - Other  
**Banking Status:** Banked  
**Other Financial Services Received:**

**Secondary Client:**  
**Coach:** Gun Vang  
**City:** CITY  
**Zip:** 11111  
**County:** Cook  
**# of Adults in HH:** 4  
**# of Minor Children in HH:** 3  
**Ethnicity:** Non-Hispanic  
**Selected Ethnicity:**  
**Barriers to:** Credit, Savings  
**Time Receiving Services (Months):**

**Client demographics**

Questions	Intake Data	Annual Data	Annual Data	Annual Data	Annual Data	Annual Data	Annual Data	Program Completion Date
Date Collection	10/21/2021	10/21/2021						10/21/2021
Rent	\$1,000.00	\$1.00						\$1.00
Savings	\$1.00	\$0.00						\$10,000.00
Monthly Household Income	\$1,400.00	\$0.00						\$4,000.00
Credit Score	600							600
Collections/Judgments	\$0.00	\$0.00						\$0.00
Credit Card/Unsecured Debt	\$0.00	\$0.00						\$0.00
Student Loan Balance	\$0.00	\$0.00						\$0.00
Secured/Auto/Val	\$0.00	\$0.00						\$0.00
Notes								

**Pursuing Homeownership?**  
 Client Pursuing Homeownership? ☒ Yes ☐ No **If not, why?**

**Outcome Data - Client is Financially Empowered and Confident to Pursue Homeownership**  
 Data Collection Date: 10/21/2021

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## 2.03 Returning to the Organization Page

The organization page is where Users will be able to access the full list of all Clients.

## Return to Organization Page

Homeownership Capacity Data Collection System

**Test Organization**

**Test Client**

[Update Client](#)

**Survey History**

Question	Intake Data 10/21/2021 <a href="#">edit</a>	Annual Data 10/21/2021 <a href="#">edit</a>

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## 2.04 Sorting by Client Names or Dates

The DCS allows any column data to be sorted by either in ascending or descending order. This allows a User to sort by a Client's name or by date to determine which Client's require subsequent data entry in

the DCS.

**Sort Data**

Homeownership Capacity Data Collection System

Log off

Home »

**Test Organization**

Add new Client

Clients

Client	Intake Date	Annual Data	Annual Data	Annual Data	Annual Data	Annual Data	Completion Date	Purchased Data	Not Purchased Data	Continuing Data	Client Stopped Communicating
Client, Test	10/21/2021	10/21/2021					10/21/2021			10/21/2021	
Client, Test	10/21/2021										
TEST, TEST	08/03/2018	08/10/2018					08/17/2018				

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Click on any column name to sort either ascending or descending order.

## 2.05 Find a Client Name

To find a Client name, push the “Ctrl” + “F” key on your keyboard at the same time. A box will appear to enter the Client name.

**Search or Find tool**

Homeownership Capacity Data Collection System

Log off

Home »

**Test Organization**

Add new Client

Clients

Client	Intake Date	Annual Data	Annual Data	Annual Data	Annual Data	Annual Data	Completion Date	Purchased Data	Not Purchased Data	Continuing Data	Client Stopped Communicating
Client, Test	10/21/2021	10/21/2021					10/21/2021			10/21/2021	
Client, Test	10/21/2021										
TEST, TEST	08/03/2018	08/10/2018					08/17/2018				

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On your keyboard, push “Ctrl” + “F” at the same time to search for a Client. A box will appear for you to enter the Client’s name.

## 2.06 Editing Data

Users do not have the ability to edit submitted surveys and must report edits to Minnesota Housing.



Common situations where edits are required:

- Data is entered incorrectly.
- The same Client is entered multiple times.
- A Client is entered as Client Stopped Communication but re-engages before the time that they can be counted as a new Client under the Program.

Users can request edits at any time. They do not need to wait until the end of the quarter. Users must report all errors by emailing [HomeownershipCapacity.mhfa@state.mn.us](mailto:HomeownershipCapacity.mhfa@state.mn.us) with the following information:

- First two letters of the Client's last name, first two letters of the Client's first name
  - Do not include the Client's full name.
- Intake date
- A description of the issue

Please see below for a few samples:

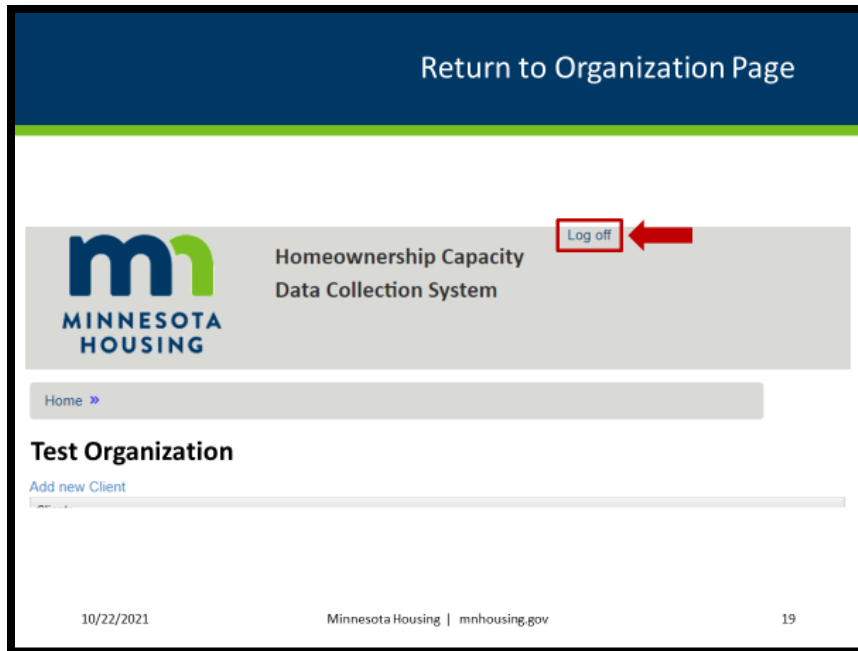
- **Data is entered incorrectly**
  - Client Name: Jo..., De...
  - Intake Date: 04/02/2018
  - The credit score at Intake needs to be changed from 642 to 624
  - Client Name: Hu....., Ma....
  - Intake Date: 04/06/2018
  - The Program Completion survey was submitted in error. Please remove this survey.
- **The same Client is entered multiple times**
  - Client Name: Va..., Br....
  - Intake Dates: 01/02/2021 and 01/09/2021
  - This Client is a duplicate Client in the DCS. Delete this Client's 1/9/2021 entry.
- **A Client re-engages after being entered as Client Stopped Communication but before they can be counted as a new Client under the Homeownership Capacity program**
  - Client Name: An....., No....
  - Intake Date: 04/03/2021
  - The Client Stopped Communication survey needs to be removed as this Client has re-engaged and cannot yet be counted as a new Client.

Minnesota Housing program staff can complete most edits in the DCS. If the edit can be made by program staff, you will receive a response to your email once the edit has been completed.

Often edits need to be made with the assistance of Minnesota Housing's technology information department. In these instances, a list is maintained and submitted on a quarterly basis. You will be notified via email if the edit requires this additional assistance. Once all edits are completed by technology information department, all contacts for your organization will receive a spreadsheet with each requested edit and the date the edit was completed. This will be sent via the Single Family Secure File Exchange, LeapFile.

## 2.07 Logging Out

To log out of the system, click Log Out in the upper right hand corner of any screen. After 15 minutes of inactivity, the DCS will automatically log the User out. If the User has not already submitted data, the data in any survey that is partially completed will be lost.



## 2.08 Reporting DCS Issues

To report any issues with the DCS, send an email describing the issue to [HomeownershipCapacity.mhfa@state.mn.us](mailto:HomeownershipCapacity.mhfa@state.mn.us). If any personally identifiable information (PII) on a Client must be included, only include the first two letters of the first name and the first two letters of the last name as well as the Intake date. The full Client name should not be included.